



**Nottingham**  
BEHIND EVERY INVESTMENT



**6 February 2018**

High tech. High touch. Holistic infrastructure.

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# PROGRAM UPDATES

## I. Plan Disclosure

## II. Marketing

- i. Website & enrollment platform
- ii. Traditional marketing creative
- iii. Social media launch campaign

## III. Launch Timeline



## Save today for a better tomorrow

Providing persons with disabilities a secure financial future

[How It Works](#)

### Who is eligible?

There are a few requirements for opening a CalABLE account.

[Learn about eligibility](#)

### Invest easily.

Choose options that fit your goals and comfort level.

[Learn about investment options](#)

### Start here

It only takes a few minutes and a few clicks.

[Open an account](#)

#### Forms

Everything to open and manage your account.

#### How It Works

Learn how it works with three simple steps.

#### Proving Eligibility

Proving eligibility is easy!

Before investing in any ABL program, you should consider whether your home state offers an ABL program that provides its taxpayers with favorable state tax or other benefits that are only available through investment in the home state's ABL program. You also should consult your financial, tax, or other adviser to learn more about how state-based benefits (or any limitations) would apply to your specific circumstances. You also may wish to directly contact your home state's ABL program, or any other ABL program, to learn more about those plans' features, benefits and limitations. Keep in mind that state-based benefits should be one of many appropriately weighted factors to be considered when making an investment decision.

[Privacy Policy](#) | [Plan Disclosure Documents](#) | [Business Continuity Plan](#) | [Security Policy](#) | [National ABL Alliance](#)

[CalABLE Website](#) | [Join Our Mailing List](#)



## CalABLE Enrollment Form

1. Important Information
  2. Account Type
  3. Account Owner
  4. Authorized Legal Representative
  5. Co-Authorized Legal Representative
  6. Authorized Agent
  7. Email Address
  8. Investment Option Selection
  9. Contribution Method
  10. Bank Information
  11. Signature and Certification
- [Delete Application / Start Over](#)
- [Create PDF Application](#)



Achieving a Better Life Experience

## CalABLE Program

## Enrollment Form

### Important information about opening a new CalABLE account

We are required by federal law to obtain from each person who opens an CalABLE account certain personal information- including name, street address, and date of birth, among other information-that will be used to verify their identity. If you do not provide us with this information, we will not be able to open your CalABLE account. If we are unable to verify your identity, we reserve the right to close your CalABLE account or take other steps we deem reasonable.

- Use this form to open a new CalABLE account for a Beneficiary
- Before investing you should check with your or Beneficiary's home state to determine if it offers tax or other benefits for investing in its own plan.
- You must provide all information except where optional is indicated.

Feedback



# MARKETING

Creative strategy and design concepts have been developed by Brogan & Partners to align with the website and enrollment platform

Traditional marketing materials under development:

- Enrollment packet (detailed)
- Rack brochure (high level)
- Brand Style Guide
- Letterhead & PowerPoint Templates
- Email campaign concepts



# BRAND PERSONALITY TRAITS

- Trustworthy
- Collaborative
- Flexible
- Humble
- Of integrity
- Transparent
- Accountable



# COMPETITIVE DIFFERENTIATORS

- One of only three ABLE programs with no required Medicaid payback - afforded only to CA residents.
- The only program offering Target Date investment options.





# MARKETING SEARCH OPTIMIZATION

- Continual optimization for click-throughs and website traffic
- Social media campaign wrap up reporting to include recommendations based on campaign performance



# UPDATED TIMELINE

TASK	COMPLETION
Final investment options	Complete
Issue FDIC RFP	Complete
Social media kickoff call	Complete
Call center program outline	Complete
Call center staffing plan	Complete
Solix/Nottingham training	Complete
Web-based enrollment dynamic form	Complete
Select bank for DDA & FDIC	Complete
Configure portfolios in Nottingham recordkeeping system	Complete
Execute SSA agreement	Complete
Website review and testing by CalABLE	In process
Program Management agreement executed	In process
Negotiate service agreement with DFA and Vanguard	In process

# UPDATED TIMELINE

TASK	COMPLETION
Disclosure documentation finalized	2/9/2018
Open omnibus accounts at DFA and Vanguard	3/1/2018
Programming & configuration of participant website with recordkeeping and reporting requirements	3/2/18
Initiate press release series about website	TBD
Define call center quality assurance initiatives	3/26/2018
Social media campaign #1 launch	3/30/2018
Test trades with mutual funds	3/30/2018
Initiate press release series about program launch	4/4/2018
Website soft launch	4/9/18
Call center recruiting	4/11/2018
End-to-end testing	4/13/2018
GO LIVE	TBD